

Statement of Requirement for Tender HMT465; Learning Management System

About HM Treasury

HM Treasury is the UK Government's finance and economics department. Over the life of the current Parliament, the Treasury will aim to secure a rebalanced and resilient economy that will create the conditions for sustainable growth. The Treasury will focus on three priorities:

- to reduce the structural deficit in a fair and responsible way;
- to create the conditions that secure an economy that is growing sustainably, is more resilient, and is more balanced between public and private sectors and between regions; and
- reform the regulatory framework for the financial sector to avoid future crises.

Scope

The Treasury currently employs approximately 1,300 staff, reducing to nearer 1,000 over the next few years. Treasury Group includes several ALBs including DMO and APA who may wish to use the system. Additionally as we rent out office space in our building, and look to provide HR services to other government departments and agencies, we may wish to provide them with access to the LMS, as well as our own employees.

Background to requirement

The Treasury has had a Learning Management System in place for approximately 6 years, and with various changes within the Department, our current system no longer meets the needs of the organisation.

The development of Civil Service Learning as a central provider of generic learning for the whole Civil Service will change the way that employees access learning and development opportunities. In particular, there will be a reduction in face-to-face events, and a greater amount of e-learning available to employees. The Treasury will remain responsible for developing learning interventions which are specific to its requirements, e.g. induction and specialist training.

We are looking to implement a new LMS to track learning and development activity of all staff, and also host e-learning content which we will be developing over time.

Duration

The contract will be for a period of three years, with the option to extend for a further two years.

System requirements:

- Hosted system, accessible via the Internet;
- Front-end portal designed in line with Treasury corporate branding;
- Full management of face-to-face learning events (e.g. sign-up / unenroll via self service, management of waiting lists, generate delegate lists, facility to email enrolled delegates);
- Ability to host and manage e-learning content (SCORM compliant);

- Learning Path functionality, allowing learning to be automatically assigned to staff by category (organisation unit, grade etc);
- Collate and report on evaluation of learning;
- Sophisticated reporting tool to provide management information
- Ability to target communications to specific groups of learners (e.g. by grade, organisation unit, profession etc)
- Facility to record and validate individuals' core skills and competencies, and suggest appropriate interventions for future development;
- Ability to record and validate individuals' skills and competencies; and
- Support for tracking talent management and succession planning

Data capture

We would like to import data from our Oracle HR system on a weekly basis to capture staff changes (e.g. joiners and leavers, internal moves, promotions etc). We envisage this being achieved through uploading a CSV data file. Although we don't envisage migrating data from our current LMS, suppliers are asked to provide any costs which may be associated with this.

Costs

Suppliers are asked to provide a total cost of ownership over a 5 year period, and a full breakdown of costs, including:

- Initial purchase costs;
- Set-up/implementation;
- Annual licensing costs;
- Development of additional front-end portals;
- System upgrades; and
- Any other costs which may be applicable.

Where any cost is based on the number of users, this per-user fee should be provided. We are interested in seeing a range of purchase options, including perpetual licence and software as a service.

Evaluation criteria:

Proposals will be evaluated against the following criteria (weightings shown in brackets):

- Functionality of the system (5)
- Management information reporting (5)
- Accessibility / ease of use for end-users (4)
- Ongoing support and client relationship management from supplier (4)
- Costs – incl value for money (4)
- Implementation plan (3)
- Sustainability incl environmental, social and economic factors (3)

Tenderers are required to complete the attached spreadsheet ref Annex A, setting out how the proposed system meets the system requirements above, and return along with their tender

proposal. **Proposals should not exceed 20 sides of A4 in total, including the spreadsheet at Annex A and any other attachments.**

Procurement Timetable

The target go live date for the new system is Monday 19 September. Suppliers should provide a project plan to meet this deadline.

The timetable for award of contract is:

- Issue invitation to quote: Thursday 23 June
- Deadline for receipt of questions: Thursday 30 June
- **Deadline for receipt of proposals: Wednesday 13 July - noon**
- Supplier presentations (if required): w/c 18 July (for shortlisted suppliers)
- Contract awarded: end July

Questions

All questions regarding this requirement must be uploaded to the Buying Solutions portal by Thurs 30th June 2011.

Deadline for receipt of tenders

Tender responses must be uploaded to the Buying Solutions portal **by noon on Wednesday 13 July 2011**. Please also e-mail a copy to [REDACTED]

Terms and Conditions

This requirement is competed via the Buying Solutions - Learning & Development and eLearning Solutions - Information Technology (Ref RM464C/12) framework. Framework T&Cs apply - no others will be accepted.

Government Transparency Agenda

Suppliers should note that the terms of the proposed contract will permit the Contracting Authority to publish the text of this contract, subject to possible redactions at the discretion of the Contracting Authority. In submitting a tender, a supplier is acknowledging the Contracting Authority's right to publish information contained within that tender, should that information be incorporated into any contract awarded.

Terms of offer

This tender process is confidential. Tenderers should not disclose the fact that they have been invited to tender and must not disclose or otherwise make available this information to any third party other than the tenderer may communicate, disclose or otherwise make available this information to an employee or a professional adviser who requires the information in connection with the preparation of the tender, provided they are bound by equivalent conditions.

This work is subject to the Freedom of Information Act 2000 and any information submitted to the review may be subject to disclosure to a third party. You should identify any information included in

your submission that you consider exempted from disclosure under the Act. If you would like more information about this aspect, please contact us.

HM Treasury shall acquire title to all new intellectual property rights in the finished study and shall be at liberty to publish it in part or in its entirety with due acknowledgement.

Prices stated in the offer must remain open for acceptance for 90 days.

Prices must be firm for the duration of the contract and any extension.

The contract will be awarded on the basis of the most economically advantageous offer judged on the evaluation criteria detailed above.

The Authority shall have no liability for any cost or expense you may incur as a direct or indirect consequence of your tendering for the provision of the services.

The authority does not bind itself to accept the lowest or any tender.

You are advised that nothing in this letter or its appendices or any other communication made between the Authority and any other party shall be taken as constituting a contract, agreement or representation between the Authority and any other party (save for the award of contract made in writing by the Authority), nor shall such be taken as constituting a contract, agreement or representation that any contract shall be offered in accordance herewith or at all.

You are also advised that except as otherwise expressly provided, no communication to you shall have any validity under any resultant contract unless made in writing on behalf of the Authority.